Project methodology in subject-based knowledge organization: Experiences from the UK

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Workshop objectives

- The theory of project management through examples of three international research projects in knowledge organization
  - Project documentation from application to delivery
  - Hands-on project planning exercises

Why is project management important?

- Clarify the purpose and objectives between funders/stakeholders and the project team
  - Important: align stakeholders' with researchers' views and expectations
- Clarify tasks and responsibilities between project team members
- Plan and monitor/control

Good project management…

- Spends considerable time planning
  - But does not overdo planning, e.g., many funders ask for a lot of administration
- Makes funders and stakeholders happy
- Delivers all deliverables on time
- Dissemination
  - Perception of the project very important → promote it!
  - Results in peer-reviewed papers
    - Best open access for best citation and impact
- Generates more funding

…Good project management

- Is great fun:
  - Good project managers:
    - Low-stress and common sense
    - Care passionately about the project, have good judgment, creative

- Is about people:
  - *“good project management is about how you work, interact and communicate with people”*

(Newton, 2005, p. 2)

Communications

- Communicate with great care and effort with the project team and the stakeholders
- Do not just share the project plan and update sporadically

- Plan well to talk to all the people you need to
  - Listen about how they perceive their task/need, direct them / explain
  - Do not make assumptions, discuss them all, and keep checking

Duration estimates

- Always first ask your team members when *they* can do it, and then negotiate it back

- Usual problem: underestimating
- Always under-promise and then you will over-deliver
  - Very good for project perception

Budget planning

- Often a percentage of institutional contributions

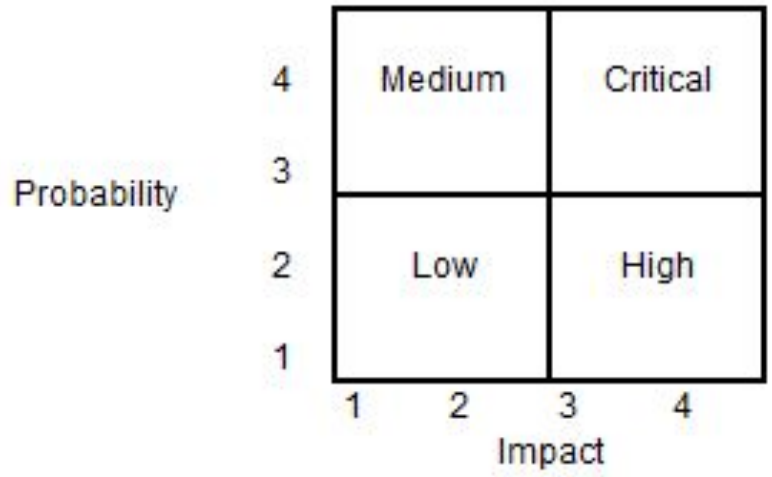
- Staff costs, incl. travels
- Contractors and consultants

- Purchased items (e.g., PCs, software…)

- Overspend / underspend

Risk management

- *“If everything seems to be going well, you obviously don't know what is going on.” (Murphy’s Law)*
- Risk identification
- Risk quantification



- Risk response (who, what, when)
- Control/monitor

Behind schedule

- Motivation important:
  - Give praise for good parts done
  - Give constructive feedback for things gone bad
  - Exercise 1: write an email to a person responsible for a delayed task
- Ask why to get to the very root of the cause
  - *Einstein: “you can’t solve the problem with the same mind that created it”*

Useful tools

- Free:
  - For Gannt charts http://www.ganttproject.biz/
  - For scheduling meetings http://doodle.com
- Commercial:
  - Primavera Risk Analysis (risk management), cca £6000

Applying for external funding

External calls for proposals

- Allocate good time for writing good project proposals
  - staff writing project proposals ideally needs to be given time during normal working hours to do it

- Project marking
  - The qualitative value of the research project
  - How well the guidelines have been followed
  - How well the idea has been conveyed – writing style, good language!

JISC Information Environment and e-Research Grant Funding Opportunity 12/08: Call for Proposals

- **A1** Automated metadata generation & text mining
  - 225,000, 18 months
- **A2** Developing e-infrastructure to support research disciplines
  - 1,350,000, 36 months
- **A3** Repositories: start-up
  - 30,000 (60,000 for consortia), 18 months
- **A4** Repositories: rapid innovation
  - 30,000, 6 months
- **A5** Repositories: enhancement
  - 350,000, 24 months

Project application

- Project proposal template
- Budget template

- Must be on time, submit at least a day in advance in case software problems

- p.33: evaluation criteria:

- ***Appropriateness and Fit to Programme Objectives and Overall Value to JISC Community***
  - Is the proposal in scope?
  - Is the proposal a good idea?
  - Does the bid clearly articulate its intentions?
  - Does the proposal demonstrate that the project outputs meet a need and will result in benefits to the community?
  - What is the expected impact of the project?
  - Will it affect a specific or larger community?
  - Does the proposal show a clear distinction between immediate and long term impact expectations?
  - If appropriate, is the bid technologically innovative and sound?
  - Is there evidence that the proposal has been developed in the context of institutional learning, research and/or information management strategies to ensure that project outputs can be embedded and sustained beyond the JISC funding period?
  - Where appropriate, does the bid use technical approaches and standards that mean it can be more easily reused and is interoperable?
  - If appropriate, has it indicated an intent to work with the JISC e-Framework?
  - If appropriate, does the bid discuss sustainability beyond project funding?

- ***Quality of Proposal and Robustness of Workplan***
  - Are there clear deliverables?
  - Is the methodology for meeting the deliverables sound and achievable?
  - Is the workplan robust in terms of project management arrangements?
  - How will the success of the project be measured?
  - Does the bid include a well-thought-through initial assessment of risks, which considers the project's failure to deliver, and predictable consequences that are not necessarily positive?

- ***Engagement with the Community***
  - Does the bid propose engagement with project stakeholders and practitioners (if appropriate) throughout the life of the project?
  - Is a stakeholder mapping and/or user needs analysis provided?
  - Does the bid propose an appropriate dissemination approach?
  - Does it have an appropriate evaluation approach, e.g. talking to stakeholders?
  - Does the bid demonstrate willingness to work in partnership with JISC in the dissemination and evaluation activities and to make available outputs beyond the funding period?
- ***Value for Money***
  - Are the proposed outputs likely to be transferable to the wider community?
  - Does the bid discuss the quantitative and qualitative benefits to the project partners of undertaking the work?
  - Given the benefits, are the institutional contributions appropriate?
- ***Previous experience of the project team***
  - Does the bid demonstrate a realistic understanding of the scale of the task, both in terms of technical and management issues?
  - Does the bid demonstrate previous successful delivery and management of projects?
  - Does the bid link the expertise of the team with the roles to be undertaken and the staffing budget?
  - If the bid is from a consortium: i) have the partners provided evidence of their commitment in the form of supporting letters? ii) have the partners demonstrated how the work aligns with their objectives and priorities? iii) is it clear what the role of each partner is and how the actual or planned management structure, governance, decision-making and funding arrangements will function?

Exercise 2

- **A.** Based on the imagined Call for Proposals, choose one of the strands and sketch major ideas for each of the five sections
  - in groups

- **B.** Then exchange with a neighbour group and mark based on the criteria

Highest-ranked project in A1: EASTER

- http://www.ukoln.ac.uk/projects/easter/

- Project proposal (+ budget plan)
  - Sections based on the evaluation criteria set out in the guidelines

Other project documents

Project plan and workpackages

- Based on templates
- Once approved, derive project plan based on project application
  - Exercise 3: look up EnTag project plan and identify major sections
- Workpackages
  - a Gannt chart and deliverables by month
  - Workpackage and activity
  - Earliest start date, Latest completion date
  - Outputs
  - Deliverables
  - Responsibility
  - Exercise 4: look up EnTag workpackage plan and identify major sections

Interim report, Final report, Financial report, Completion report

- Based on templates
- E.g., http://www.ukoln.ac.uk/projects/enhanced-tagging/documentation/

- Exercise 5: Look up final report and completion report. What is the difference between the two types of reports?

Dissemination

- Constant communication with team members and stakeholders
  - Informal and formal
- Seminars, conferences
  - Poster –> short paper –> full paper –> journal article
- Blogs, web sites, twitter

Summary

- Take the time out to plan
- Communicate, keep the team and stakeholders involved and informed throughout the project
- Evaluate progress against the plan
- Actively manage the risks
- Disseminate

Further reading

- Department for Business Innovation and Skills. (2010). Guidelines for managing projects: How to organise, plan and control projects. Retrieved from https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/31979/10-1257-guidelines-for-managing-projects.pdf
- Newton, R. (2005). The project manager: Mastering the art of delivery. Harlow: Pearson Education Ltd.